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Agriculture Economics

Reports

From USDA's Economic Research Service

Fall 1984

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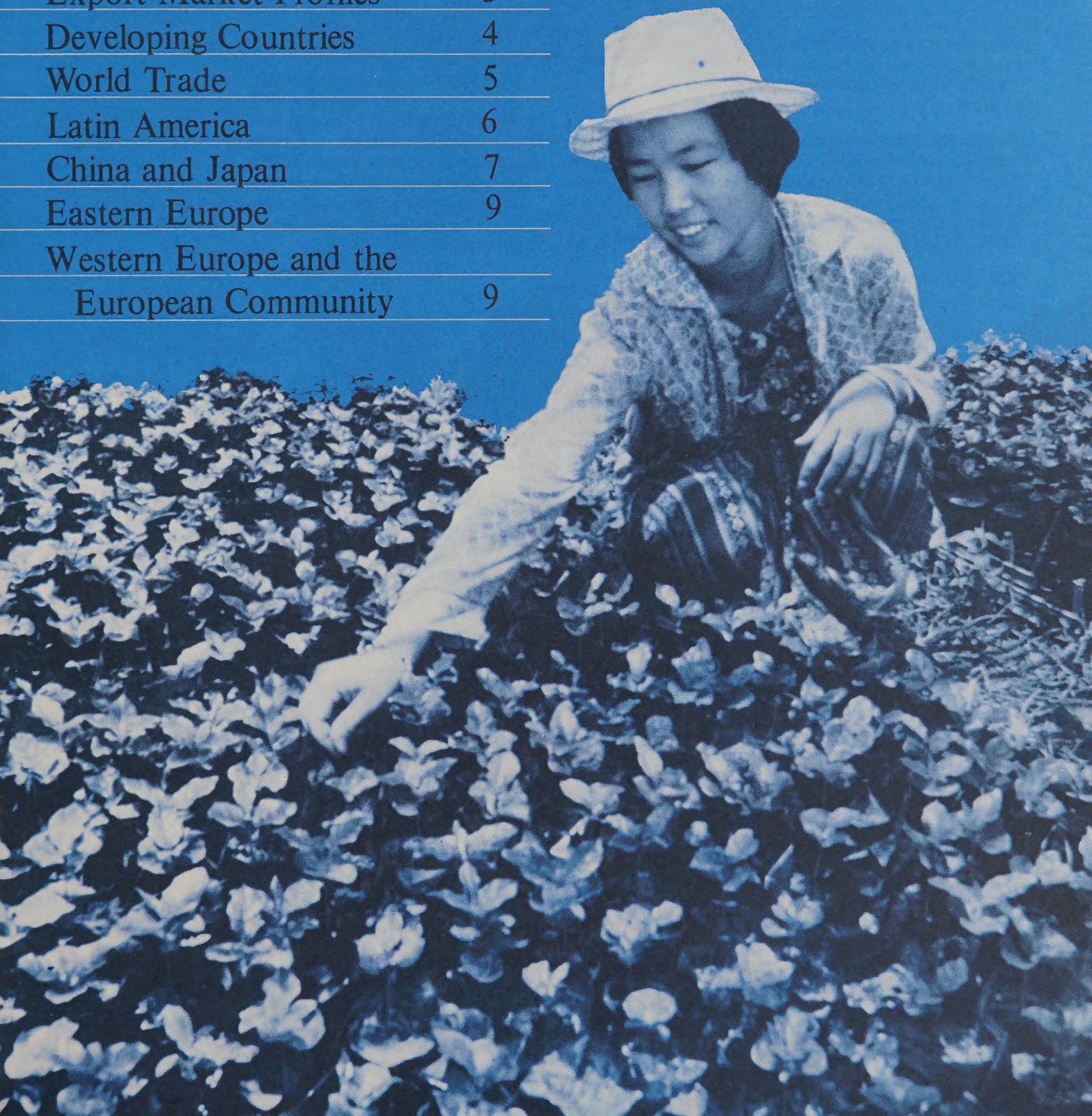
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Introduction

Understanding world agriculture through research is an important part of the work of the Economic Research Service (ERS), an agency of the U.S. Department of Agriculture. This special edition of **Reports** is devoted to recent ERS publications on international agriculture and trade.

In addition to research monographs, ERS also issues timely periodicals which provide a wealth of current analysis, outlook, and statistics for the world and major regions.

For reports on developing countries and world trade, turn to page 4.

Reports with a regional focus are listed by region, beginning on page 6.

How to obtain reports. All the reports in this catalogue can be purchased from U.S. Government sales agencies.

Most ERS reports (designated "GPO" in this catalogue) are sold through the U.S. Government Printing Office.

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We have changed the name and the look of **ERS Abstracts**, the free catalogue of USDA's Economic Research Service, but our service to readers will remain the same.

Reports will continue to bring you, several times a year, descriptive listings of each new ERS publication. All readers on the **ERS Abstracts** mailing list will automatically receive future issues of **Reports**. If you are not already on our mailing list, please fill out and return the coupon on the back cover.

U.S. Department of Agriculture
Economic Research Service
June 1988

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New magazine on rural development

ERS will soon begin publishing **Rural Development Perspectives**, a lively new magazine featuring practical research findings and useful ideas for rural areas. For full details, see page 14.

Export Market Profiles

Taiwan: An Export Market Profile, by Donald A. Sillers. FAER-185. August 1983. 96 pp. Order SN: 001-000-04345-5 from GPO, page 15. \$4.50.

This indepth look at Taiwanese agriculture and food demand shows why Taiwan has become the 10th leading importer of U.S. agricultural products. It finds that feed grains, soybeans, wheat, cotton, tobacco leaf, and other bulk, unprocessed, and semiprocessed commodities will continue to constitute the major share of U.S. farm exports to the island.

Venezuela: An Export Market Profile, by Paul J. Trapido and Luis R. Sanint. FAER-201. June 1984. 32 pp. Order SN: 001-000-04407-9 from GPO, page 15. \$1.75.

Tells why the United States should remain Venezuela's largest supplier of farm products through 1990, after an initial drop in imports as the Venezuelan economy adjusts to reduced oil

Keep a step ahead of your competitors by getting the best government forecasts on commodity-specific export potential through 1990 for selected countries in Africa, Asia, Latin America, and the Mideast. Export Market Profiles is a new series produced jointly by USDA's Economic Research Service and Foreign Agricultural Service. Each title in the series (approximately 20 titles in all) will highlight the production potential of one country's agricultural sector, major trade policies, and export potential for U.S. commodities.

revenues following the 1974-79 period of sustained high oil prices. Although the value of U.S. agricultural exports to Venezuela dropped from \$898 million in 1981 to \$670 million in 1982, and could be as low as \$550 million in 1983, that value should rebound to \$1 billion by 1990.

Honduras: An Export Market Profile, by H. Christine Bolling. FAER-196. February 1984. 20 pp. Order SN: 001-000-04397-8 from GPO, page 15. \$1.50.

A look at the poorest country in Central America, which nonetheless is a modest but steady consumer of U.S. agricultural products. This

report finds that Honduras may purchase \$75 million of U.S. farm products by 1990. That would be up from only \$51 million in 1980, a year in which the United States exported more than \$41 billion of agricultural commodities worldwide. Honduras will likely continue to have slow economic growth and a rising external debt in the 1980's.

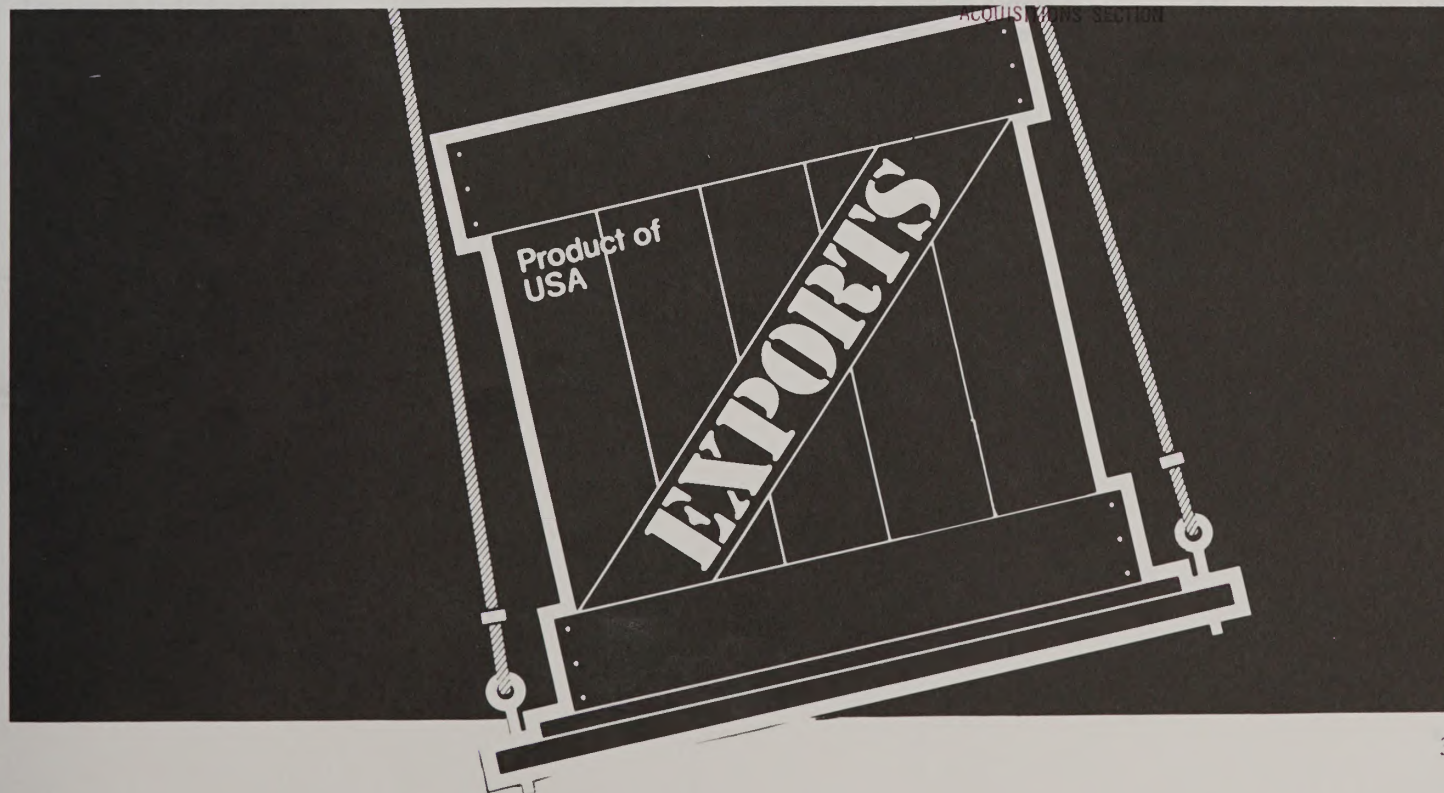
Brazil: An Export Market Profile, by Samuel R. Ruff and Myles J. Mielke. FAER-197. January 1984. 28 pp. Order SN: 001-000-04396-0 from GPO, page 15. \$1.50.

This report shows why Brazil, among the leading 20

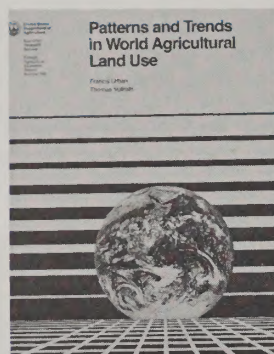
importers of U.S. agricultural goods in the early eighties, will likely allow the United States less than a 50-percent share of its import market through the balance of the decade. Government policies and increased competition from Canada, the European Community, and some favored Latin American countries may hamper U.S. efforts to further penetrate Brazil's market.

Dominican Republic: An Export Market Profile, by H. Christine Bolling and Nydia Rivera-Suarez. FAER-186. August 1983. 36 pp. Order SN: 001-000-04364-1 from GPO, page 15. \$3.50.

This report examines the prospect for expanded U.S. agricultural exports to the Dominican Republic during the 1980's. By 1990, the U.S. share of the Dominican Republic's agricultural import market could reach \$450 million, up substantially from \$220 million in 1980. A greater share of the emerging high-value agricultural product market is possible.

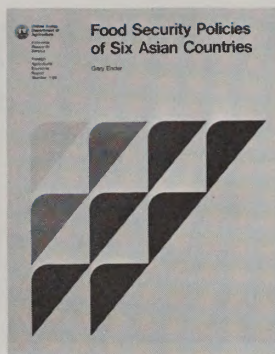


Developing Countries



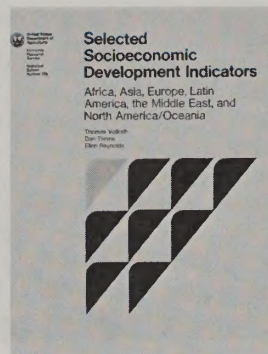
Patterns and Trends in World Agricultural Land Use, by Francis Urban and Thomas Vollrath. FAER-198. April 1984. 40 pp. Order SN: 001-000-04409-5 from GPO, page 15. \$2.00.

Measures global agricultural land availability and trends and provides specific land constraints to world food production projections. Technological change will be essential in increasing crop production to meet world food needs because the world's population is increasing at a much faster rate than usable agricultural land. Although about half the world's estimated 3 billion hectares of arable land is currently used for crop production, the remainder is generally believed to be only marginally productive.



Food Security Policies of Six Asian Countries, by Gary Ender. FAER-190. September 1983. 80 pp. Order PB84-100676 from NTIS, page 13. Paper copy \$11.50, microfiche \$4.50.

Asia's food security policies, according to this study of Bangladesh, India, Indonesia, Republic of Korea, the Philippines, and Taiwan, achieved a measure of success. The report finds that per capita cereal consumption in these countries generally varied less from trend than did per capita production from the late 1960's to 1980. This tendency, especially true in the poorer countries, reflects the effectiveness of food security policies implemented throughout the period.



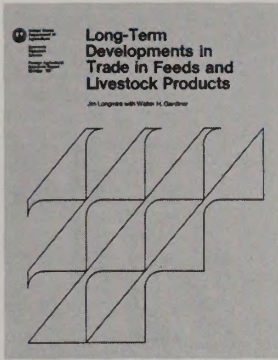
Selected Socioeconomic Development Indicators: Africa, Asia, Europe, Latin America, the Middle East, and North America/Oceania. SB-705. March 1984. 160 pp. Order PB84-173921 from NTIS, page 13. Paper copy \$16.00, microfiche \$4.50.

Statistical data on 29 development indicators for 79 countries in six different regions, usually for 1953-77. A unique compendium of varied indicators useful for gauging links between development and agricultural demand, supply, policy, and trade.



Food Policies in Developing Countries. FAER-194. December 1983. 76 pp. Order PB84-130616 from NTIS, page 13. Paper copy \$11.50, microfiche \$4.50.

This 21-nation survey, prepared by a team of economists from ERS and the University of Minnesota, provides a framework for analyzing developing country food policies. Includes case studies of Kenya, Tanzania, and Senegal. Finds that developing nations find national food policies a necessary, but not sufficient, condition for economic development. Use of such policies does not affect development as much as the extent to which they are used.



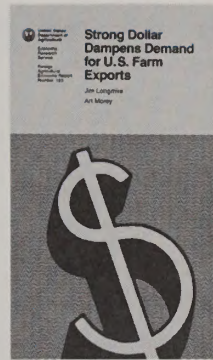
Long-Term Developments in Trade in Feeds and Livestock Products, by Jim Longmire, with Walter H. Gardiner. FAER-199. January 1984. 28 pp. Order PB84-155167 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

This report finds that international trade in feeds outpaced trade in livestock products during the 1970's reflecting a trend toward greater domestic livestock production. Trade in feeds, poultry, and dairy products grew faster in the 1970's than in the 1960's, while trade in red meats grew at a much slower pace. Long-term trade patterns will be influenced not only by technological advances for each commodity but also by trade policies, consumer preferences, and cultural practices.



High-Value Agricultural Exports: U.S. Opportunities in the 1980's. FAER-188. September 1983. 88 pp. Order SN: 001-000-04371-4 from GPO, page 15. \$4.50.

World trade in high-value agricultural products (such as processed foods or high-priced commodities like fresh fruit) grew fast enough over the 1970's to surpass the trade in low-value bulk products. While the United States has been hard pressed to maintain a 10-percent share of this expanding market, the EC has used export subsidies and aggressive export promotion to dominate it. This groundbreaking study suggests that redirected U.S. marketing efforts and trade programs could close the gap, with impressive payoffs for the U.S. economy, employment, and trade balance.



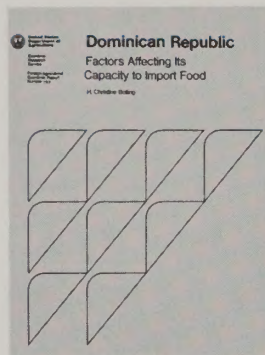
Strong Dollar Dampens Demand for U.S. Farm Exports, by Jim Longmire and Art Morey. FAER-193. December 1983. 40 pp. Order SN: 001-000-04395-1 from GPO, page 15. \$2.25.

Describes how the dollar's rise in value against other currencies in 1981-83 contributed to the serious slump in U.S. farm exports and the buildup of Government grain stocks. (Conversely, the 1970's boom in U.S. farm exports was partly fueled by the decline in the value of the U.S. dollar against foreign currencies.) Using results of an economic model, the authors show the effect of changes in the dollar's value, adjusted for inflation, on U.S. exports. The authors also discuss the importance of economic policies for the farm sector.



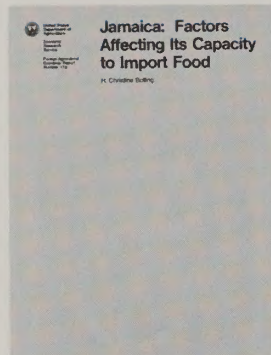
Canada's Grain Handling and Transportation System, by Mary Anne Normile. FAER-192. November 1983. 48 pp. Order SN: 001-000-04392-7 from GPO, page 15. \$1.75.

According to this status report of Canada's grain handling and transportation system, transportation problems have caused Canada to lose export sales. This study examines the causes of this decline, issues in Canadian transportation policies, and the likely outcome of Canada's plans to boost the system's capacity to handle larger volumes of grains and oilseeds.



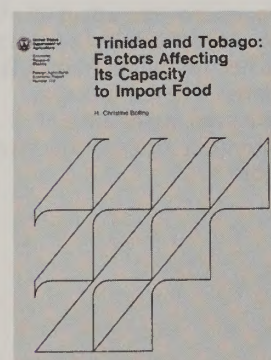
Dominican Republic: Factors Affecting Its Capacity to Import Food, by H. Christine Bolling. FAER-183. August 1983. 32 pp. Order PB83-245167 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

A look at the Dominican Republic's food imports from the United States (including soybeans, fats, and oils), which could reach \$290 million by 1985, up substantially from \$167 million in 1980. The United States accounted for 67 percent of the Dominican Republic's food imports in 1980 (73 percent if P.L.-480 aid is included). Increased domestic production in the Dominican Republic will not likely displace future imports, due to the country's emphasis on growing crops it can successfully export.



Jamaica: Factors Affecting Its Capacity to Import Food, by H. Christine Bolling. FAER-176. January 1983. 36 pp. Order PB83-139964 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

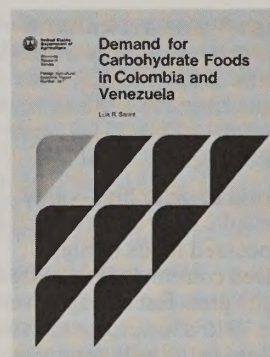
Analyzes reasons why Jamaica's real food import prices were lower in 1980 than they were in 1960. The 1985 U.S. share of Jamaica's food import market could reach \$120 million, up substantially from the \$72-million level in 1980. Jamaica's total food import bill has increased elevenfold since 1960, and reached \$198 million in 1980.



Trinidad and Tobago: Factors Affecting Its Capacity to Import Food, by H. Christine Bolling. FAER-178. January 1983. 40 pp. Order PB83-145946 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

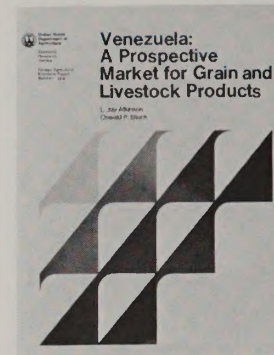
Examines population growth and changes in real income,

food import prices, domestic food production, food aid, and foreign reserves, as well as changes in import policy, affecting Trinidad and Tobago's food imports. The U.S. share of Trinidad and Tobago's \$295 million food import market in 1980 was \$105 million. The outlook is for continued growth, with the 1985 U.S. share forecast at \$180 million.



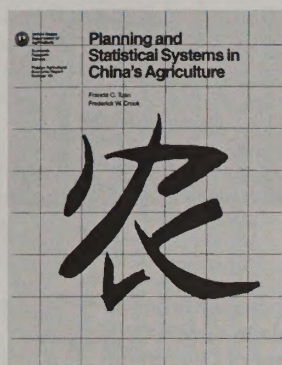
Demand for Carbohydrate Foods in Colombia and Venezuela, by Luis R. Sanint. FAER-187. September 1983. 28 pp. Order PB83-257444 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

This study finds that retail rice prices in Colombia and Venezuela fell compared with other carbohydrates (except wheat flour) and consumers more than doubled their consumption of rice during the past 25 years. Yet both countries continued to increase their imports of U.S. wheat and corn. The increase in rice consumption was mostly due to its favorable price and rising consumer incomes.



Venezuela: A Prospective Market for Grain and Livestock Products, by L. Jay Atkinson and Oswald P. Blaich. FAER-189. September 1983. 24 pp. Order PB84-100684 from NTIS, page 13. Paper copy \$7.00, microfiche \$4.50.

This report examines why Venezuela must rely on agricultural imports to satisfy its increased consumption needs, despite an accelerated agricultural program following the 1973 boom in oil revenues. The United States is the largest supplier of farm products to Venezuela (with a value soon to reach \$1 billion), but the U.S. market share varies considerably from year to year.



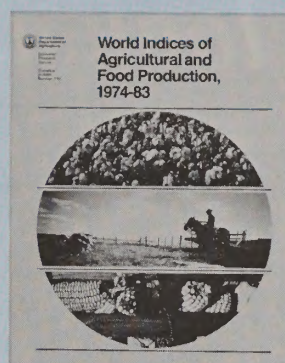
Planning and Statistical Systems in China's Agriculture, by Francis C. Tuan and Frederick W. Crook. FAER-181. April 1983. 100 pp. Order SN: 001-000-04329-3 from GPO, page 15. \$5.50.

Analyzes planning in China's agricultural economy, one of the world's largest, which produces more grain and hogs than any other country. Because of high domestic demand, China is also a major purchaser of grain, oilseeds, and fibers. Planners directly issue orders to control production of government-owned state farms. China's recently reestablished statistical system is particularly weak in rural areas because of shortage of trained personnel.



Japan's Rice Policy, by William T. Coyle. FAER-164. July 1981. 36 pp. Order PB81-235004 from NTIS, page 13. Paper copy \$8.50, microfiche \$4.50.

This examination of the role of rice in Japan's agriculture finds that Japan has begun subsidy programs to reduce rice production and increase use (more exports, using rice for feed and industrial purposes) in order to alleviate its rice surplus problem. Japan's policies reduced U.S. wheat exports to Japan by about \$30 million in 1980 and U.S. rice exports by about \$20 million. A diversion program succeeded in shifting 585,000 hectares (about 1.4 million acres) into other crops.



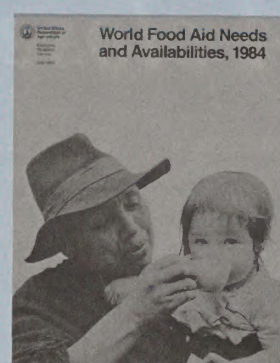
Two valuable annual reports

World Indices of Agricultural and Food Production, 1974-83. SB-710. July 1984. 172 pp. Order SN: 001-019-00348-1 from GPO, page 15. \$5.50.

Statistical data and charts on total and per capita agricultural and food production for 109 countries, 12 regions, and the world. Selected production data by country. World agricultural production grew at a compound annual rate of 2.5 percent since 1950, while the rate on a per capita basis was only 0.6 percent.

World Food Aid Needs and Availabilities, 1984. July 1984. 188 pp. Order SN: 001-019-00353-7 from GPO, page 15. \$5.50.

A major annual analysis on global food aid needs. Finds that food aid needs may decline slightly in 1984/85 from the 1983/84 high. Developing countries will require 31 million tons of imports to maintain the status quo, of which 12 million tons must be food aid.



A closer look at the world

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Checklist for forthcoming International Reports

The following reports will be available from GPO within the next few months. You may call the GPO order desk, (202) 783-3238, beginning in October for prices. Or watch for these reports in coming issues of **Reports**, and use the GPO order form in those issues.

Impact of EC Enlargement on the Common Agricultural Policy. Gene Hasha. FAER.

Energy's Role in Western Europe's Agriculture. Ruth Elleson. FAER. Order SN: 001-019-00355-3.

Argentine Agricultural Policies in the Grain and Oilseeds Sectors. Myles J. Mielke. FAER. Order SN: 001-019-0357-0.

Agricultural Progress in Ecuador. Samuel Ruff. FAER. Order SN: 001-019-0347-2.

Cameroon: An Export Market Profile. Mary Bur-

fisher. FAER. Order SN: 001-019-00349-9.

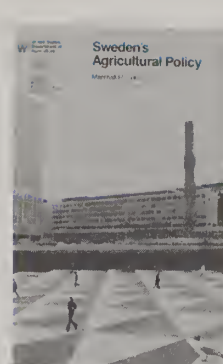
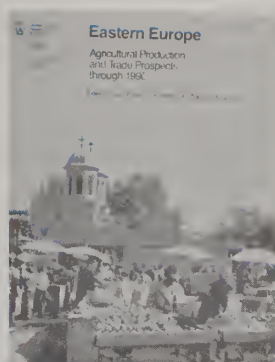
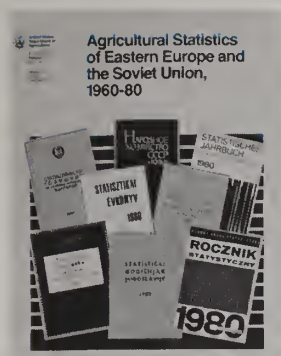
Foreign Exchange Constraints to Trade and Development. Philip Abbott. FAER. Order SN: 001-019-00340-5.

Assessing Food Supply Shocks in Developing Countries. Sovan Tun and Mervin Yetley. TB. Order SN: 001-019-00341-3.

The Brazilian Soybean Industry: Economic Structure and Policy Interventions. Gary W. Williams and Robert L. Thompson. FAER. Order SN: 001-019-00332-4.

Eastern Europe

Western Europe



Agricultural Statistics of Eastern Europe and the Soviet Union, 1960-80. SB-700. November 1983. 124 pp. Order SN: 001-000-04388-9 from GPO, page 15. \$4.00.

Presents 110 statistical tables concerning land use, farm machinery, fertilizer availability, crop production, livestock and poultry numbers, livestock products, population, and per capita consumption of selected foods from 1960 to 1980. Data are for Bulgaria, Czechoslovakia, the German Democratic Republic, Hungary, Poland, Romania, Yugoslavia, and the Soviet Union.

Eastern Europe: Agricultural Production and Trade Prospects through 1990, by Edward Cook, Robert Cummings, and Thomas A. Vankai. FAER-195. February 1984. 60 pp. Order SN: 001-000-04405-2 from GPO, page 15. \$2.00.

According to this analysis of Eastern Europe's agriculture, this region, once a growing import market, has reduced its agricultural imports. Agricultural production, particularly livestock, will grow more slowly through the 1980's. Compared with 13.5 million tons in 1980, Eastern Europe's net annual grain imports may drop to 5.1 million tons by 1984/85, and increase only slightly by 1990/91.

Sweden's Agricultural Policy, by Marshall H. Cohen. FAER-175. October 1982. 44 pp. Order SN: 001-000-04300-5 from GPO, page 15. \$4.25.

One of the only English sources on contemporary Swedish agricultural policy, this report covers the major provisions of Sweden's 1982-84 farm program. Sweden's policy objectives are to reduce government subsidies for agricultural exports, to cut back on consumer food subsidies and farmer compensation programs, and to make the levies on imports more responsive to market conditions. Chief U.S. exports to Sweden are fruits, vegetables, nuts, and tobacco. "An accurate and concise presentation," says the Swedish Ambassador to the United States.

Performance and Structure of Agriculture in Western Europe, by Ruth Elleson. FAER-184. August 1983. 84 pp. Order PB83-250621 from NTIS, page 13. Paper copy \$11.50, microfiche \$4.50.

According to this study of the expansion of Western Europe's agriculture during 1960-80, gains in the region's output were impressive, reflecting advances in technology, farm management, seed varieties, and livestock breeds. U.S. exports of feedstuffs increased rapidly in response to the needs of the region's livestock sector. However, the effect on U.S. exports may be moderated by a slowdown in the growth of the region's agricultural output during the 1980's.

Western Europe and the European Community

EC Grains, Oilseeds, and Livestock: Selected Statistics, 1960-80, by M. Herlihy and others. SB-703. December 1983. 88 pp. Order PB84-135847 from NTIS, page 13. Paper copy \$11.50, microfiche \$4.50.

Provides time-series data (1960-80) on prices and the supply/utilization of agricultural commodities for nine countries of the EC. The commodities covered include major grains, oilseeds, livestock, and dairy products. Prices are provided at various stages of the marketing chain and include those set institutionally by the EC's Council of Ministers. Some macroeconomic data—population, exchange rates, and gross domestic product—are also included.

World Trade in Fruits and Vegetables: Projections for an Enlarged European Community, by Alexander Sarris. FAER-202. August 1984. 68 pp. Order SN: 001-019-00342-1 from GPO, page 15. \$2.75.

According to this examination of EC trade in fruits and vegetables, enlarging the EC to include Greece, Spain, and Portugal would not significantly change the general pattern of world trade in these items. EC enlargement may drop prices of U.S. fruit and vegetable products only minimally from their nonenlargement levels. World supplies are expected to rise faster than world demand, leading to lower prices on international markets.

Japanese and European Community Agricultural Trade Policies: Some U.S. Strategies. Philip L. Paarlberg and Jerry A. Sharples. FAER-204. July 1984. 24 pp. Order SN: 001-019-00338-3 from GPO, page 15. \$1.50.

Japanese and EC wheat and coarse grains policies have increased the cost of U.S. farm programs and cut U.S. farm income. Authors Paarlberg and Sharples find that in trying to combat these effects, U.S. farmers would benefit more from selective EC and Japanese trade liberalization rather than a removal of barriers on all commodities. This study looks at the alternatives open to the United States, Japan, and the EC, and determines which alternatives would benefit all three parties.

Developments in the Common Agricultural Policy of the European Community, by Timothy E. Josling and Scott R. Pearson. FAER-172. June 1982. 88 pp. Order SN: 001-000-04271-8 from GPO, page 15. Price \$5.50.

Examines the directions the European Community's (EC) Common Agricultural Policy (CAP) may take in view of budgetary and enlargement pressures and suggests potential for policy changes. Josling and Pearson conclude that the ever-increasing farm subsidies prescribed by the CAP will seriously affect the EC's ability to meet other policy needs and hinder enlargement of the Community to



include Spain and Portugal. The Community, therefore, must either keep prices low directly or with producer taxes, or limit quantities covered by support measures.

The EC Market for U.S. Agricultural Exports: A Share Analysis, by Harold A. McNitt. FAER-179. March 1983. 92 pp. Order SN: 001-000-04326-9 from GPO, page 15. \$5.00.

This report assesses the market potential for all major U.S. exports to the EC. The United States should continue as a leading supplier to the EC of soybeans, sunflowerseed, corn and corn gluten feed, peanuts, citrus pulp, some animal products, soybean meal, and corn during 1981-85. EC trade policies, however, sharply restrict imports of most fruits and vegetables, processed foods, and meats.

Spain's Entry into the European Community: Effects on the Feed Grain and Livestock Sectors, by E. Wesley F. Peterson and others. FAER-180. March 1983. 112 pp. Order PB83-209270 from NTIS, page 13. Paper copy \$13.00, microfiche \$4.50.

A look at some likely effects on Spain's feed grain and livestock sectors, as well as on U.S. exports of corn,

sorghum, and soybeans, which could arise from Spain's entry into the EC. Spanish feed grain prices will probably rise, slowing growth in livestock production and feed grain use. Accession to the EC is not expected to cause major changes in Spain's imports of U.S. corn, sorghum, or soybeans, nor alleviate the EC's current farm surplus and budget problems.

The European Community's Horticultural Trade: Implications of EC Enlargement, by Kirby S. Moulton. FAER-191. November 1983. 108 pp. Order PB84-126523 from NTIS, page 13. Paper copy \$13.00; microfiche \$4.50.

Data and analysis on the EC's horticultural trade. Finds that the EC could import \$269 million of oranges, grapes, raisins, almonds, canned peaches, and processed tomatoes from the United States by 1986, a 12-percent increase over the 1978-80 average. The EC's elimination of tariff and nontariff barriers on imports from Greece, Spain, and Portugal will cut imports from the United States by \$4.5 million, but increased demand stimulated by income growth will boost imports nearly \$35 million.



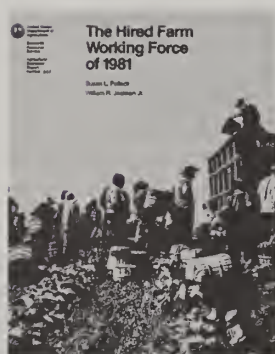
The European Community (EC), the largest market for U.S. agricultural exports, is in the process of its second enlargement, which began when Greece joined the EC in 1981. Enlargement is expected to extend to Spain and Portugal during the 1980's. What will enlargement mean to the EC's Common Agricultural Policy (CAP)? How will U.S. farm exports be affected? These reports look at a number of aspects of EC enlargement, the EC budget, and prospects for U.S. agricultural exports to EC countries during this decade.

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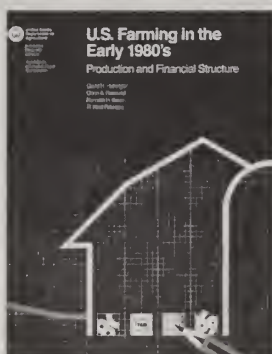
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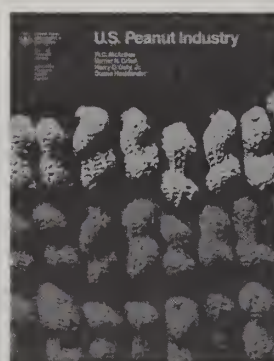


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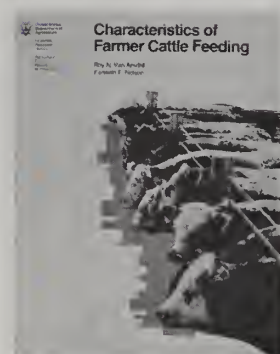
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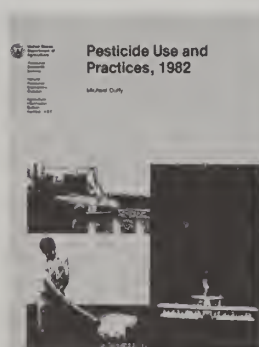
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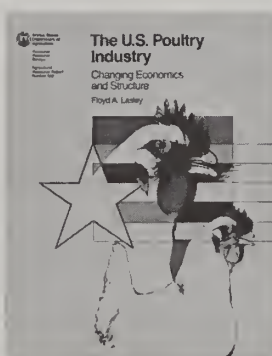
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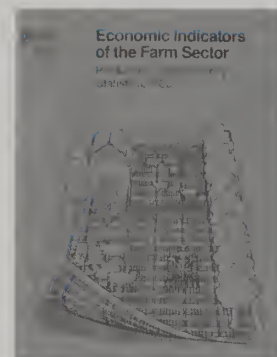
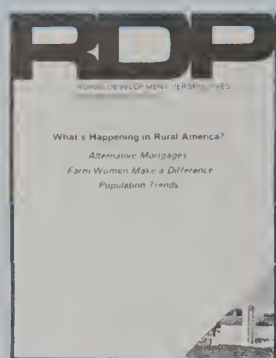
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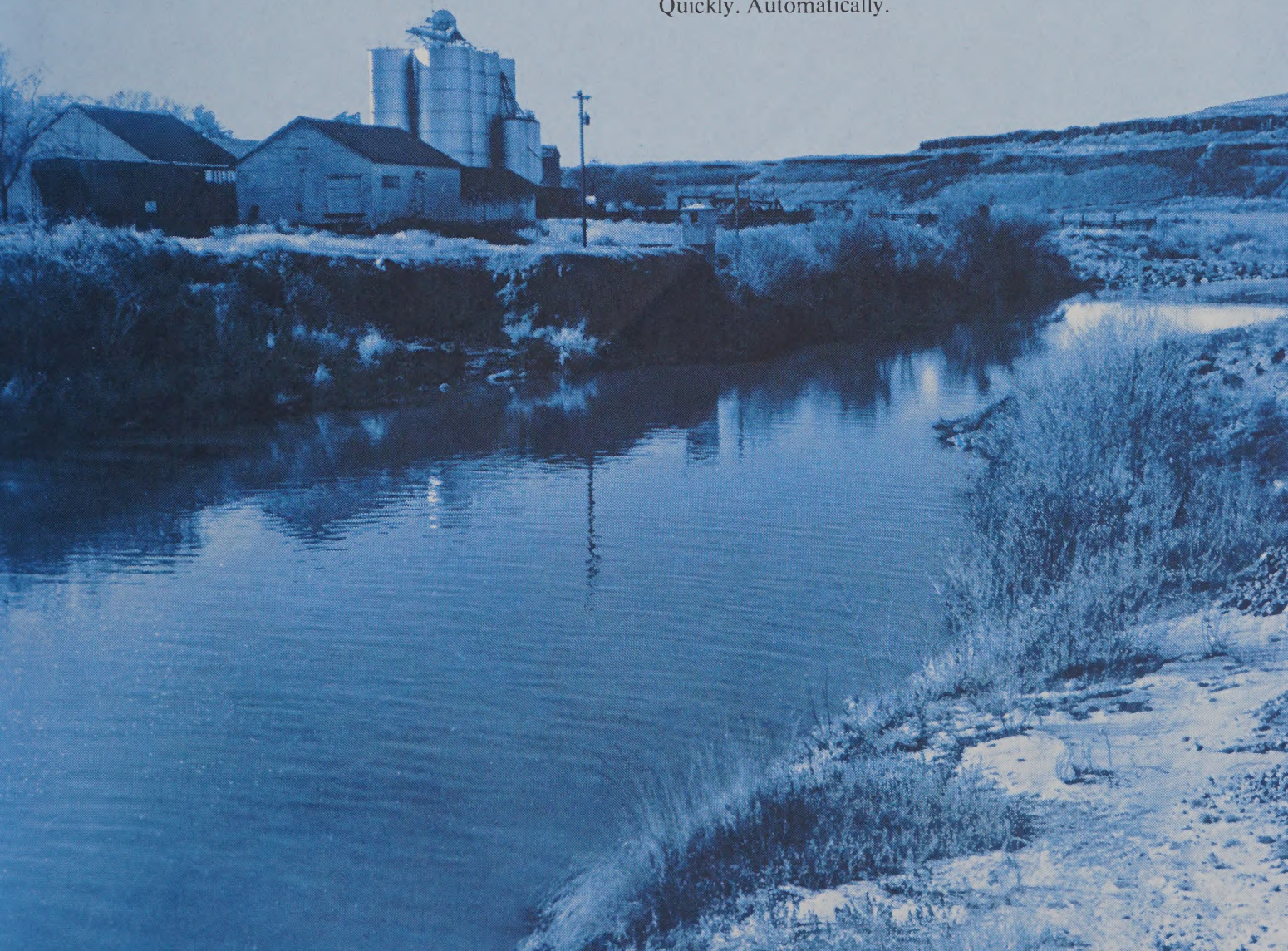
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